

**DOCUMENTS WITH THE CLERK'S OFFICE  
BY THE END OF MONDAY, 10/2/06.  
SECOND CHECK WILL BE POSTED  
ON TUESDAY, 10/3/06.  
**LATE-FILED SUPPLEMENTS WILL  
LIKELY RESULT IN THE CONTINUANCE  
OF YOUR CASE****

**\*\*\*\*\***

The Probate Examiners can be reached at ProbateNotes@courts.sbcounty.gov. Emails must have the case identification information and hearing time/date in the subject line. No attachments will be opened. Probate examiners can only respond to inquiries regarding the meaning of comments in the notes. **Please do not send emails to state that documents have been filed, to request a confirmation of whether documents have been received, or to request the clearing of notes.** No legal or procedural advice may be given.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 8:30 DEPT: S5P  
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CASE #: SPRSS06337

CASE NAME: ESTATE OF MANUEL E CHAGOLLA SR

HEARING:

Hearing re: OSC RE:

COUNSEL:

MANUEL CHAGOLLA JR (PET)...PRO/PER  
MANUEL E CHAGOLLA SR (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

OSC re Improper Distribution of Estate and re Failure to File Accounting

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petition for probate granted 6/3/05, full authority, no bond.
2. I&A filed 1/13/06 indicating \$706,700 estate value (multiple real properties and minimal personal property).
3. At 8/18/06 accounting review, matter was taken off calendar based upon statement of pro per administrator that accounting would be filed that day.
4. Accounting was never filed. Instead, on 8/18/06 the administrator filed an ex parte petition for final discharge, stating that all assets have been distributed.
5. Decedent died intestate. Administrator is one of six heirs. Grant deeds filed with petition for discharge shows administrator deeded the real properties to himself (and on one, also to an Antoinette Campa who is not an heir).
6. Distributions are highly improper and without authority.
7. Need final accounting and petition for distribution. Suggest court also order properties deeded back into estate immediately.
8. Clerk mailed notice of this OSC.

#### RECOMMENDATION

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS02781

CASE NAME: IN THE ESTATE OF MICHAEL LOGAN SOKOL

HEARING:

Hearing Re: STATUS OF FUNDS FROM STATE CONTROLLER.

COUNSEL:

MICHAEL L SOKOL (DEC)...  
GENE SIMPSON (PET)...BRUNICK ALVAREZ & BATTERSBY  
STATE OF CALIFORNIA FRANCHISE (TP )...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON

Status of Funds from State Controller

On 4/28/06, the Court heard the Status report and continued the matter re Status of Funds from State Controller to this date. **Continued from 6/9/06 at request of counsel.**

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. The estate cannot close until the funds escheated to the State are returned. On 12/10/04, attorney advises Court that he is still awaiting funds from the State. It has been almost two years since the request for funds has been made to the State of California as petitioner alleged that a letter was sent to the State Controller Unclaimed Property on 2/26/03. What is the amount of the escheated funds? Could the estate be closed and the interest in the escheated funds be distributed in kind? Or, is estate insolvent due to creditors? **Declaration filed prior to 9/30 hearing. Counsel alleged that the escheated funds are \$1,956.81 and that efforts to contact the State Controller's office have been unsuccessful. Also, the estate is insolvent due to creditor's claims. Petitioner requested an additional 90 days to resolve unclaimed property through the State Controller.**

RECOMMENDATION:

Inquire re status.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS04040

CASE NAME: EST OF GLADYS M SNOW

HEARING:

Hearing re: REPORT ON STATUS OF ADMINISTRATION

COUNSEL:

JANET M VICKERS

(PET)...GRESHAM SAVAGE NOLAN & TILDEN

JAMES L SNOW

(PET)...GRESHAM SAVAGE NOLAN & TILDEN

GLADYS M SNOW

(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON

Status Report

**Continued from 7/22/05. Notes from that hearing are set forth below (no new status report filed).**

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERWORK ARE NOTED;

1. Petitioner alleges that the estate is not in a condition to be closed because the federal estate tax return is not yet final. An amended estate tax return has been filed claiming no taxes are due. Petitioners anticipate that the estate tax return will be final in approximately one year. Question whether petitioners are awaiting the closing letter? File verified supplement.
2. Petitioner request the estate remain open until 6/30/06.

RECOMMENDATION:

Inquire re status.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS04335

CASE NAME: ESTATE OF THOMAS W THORNBURG

HEARING:

FIRST AND FINAL Account and Report of BRADFORD T THORNBURGH and  
Petition for allowance of fees filed.

COUNSEL:

BRADFORD T THORNBURGH (PET)...BEST BEST & KRIEGER  
THOMAS W THORNBURG (DEC)...  
CATHERINE J SWYSEN (TP )...SANGER & SWYSEN  
STEVEN W THORNBURG (HAHN & HAHN )...HAHN & HA

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON

First & Final Account and Petition for Final Distribution

**Continued from 8/4/06.**

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner requests statutory compensation of \$26,042.08. Ok.
2. Attorney requests statutory fees of \$26,042.08. Ok.
3. Attorney requests extraordinary fees of \$12,540.00 for services rendered in the preparation of the Estate Tax Return (Form 706). Billed at \$100/hour for paralegal time for 19 hours. Services also rendered by attorney included resolution of a litigation matter and preparation of a settlement agreement re creditor's claim. Billed at \$150/hour for 70 hours (attorney time) and \$100/hour for 1.4 hours (paralegal time). Itemized. The court has customarily allowed \$75/hour for paralegal time which would be a reduction in this instance of \$510.00 (or a total fee of \$12,030.00). JTD
4. In the disbursements schedule (Schedule F) there are payments for the following which require verified supplement:

- (a) Payments totaling \$2,500 to Thomas Reid Thale, Professional Fiduciary. Question what services were rendered?
  - (b) Payments totaling \$4,200 to Heather Feemster for administrative services. Questions what services were rendered?
  - (c) Payment of \$350 to Paul Wilkes, probate referee. Do not see an inventory valued by Mr. Wiles. Question payment?
  - (d) Attorney Sherri Kastilahn was paid a total of \$1,000. Was this payment for a proportionate share of statutory fees? (Attorney Kastilahn commenced decedent's probate proceedings).
- 5. Petitioner requests authority to withhold \$65,000 for closing expenses and to pay 2005 tax liabilities.
  - 6. Copy of bank statement is filed to support balance of cash on hand. However, there is a discrepancy between the bank balance and balance of cash on hand of \$2,648.70 (\$243,981.40 [-] \$241,332.70 = \$2,648.70). File verified supplement with reconciliation.
  - 7. Need copy of investment statement for E-Trade Account for period ending 5/31/06. Copy filed is for period ending 6/30/05.

RECOMMENDATION:  
Need to clear notes.

San Bernardino Superior Court  
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HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS04986

CASE NAME: ESTATE OF MONA M GSOELL

HEARING:

WAIVER OF Account and Report of MONIQUE A GSOELL and Petition  
for allowance of fees filed.

COUNSEL:

MONIQUE A GSOELL (PET)...MARTIN E KELLER  
MONA M GSOELL (DEC)...  
DEPT. OF HEALTH SERVICES (TP )...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for final distribution upon waiver of accounting and for fees.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need notice of hearing and proof of service.
2. Need accounting waivers (petitioner is one of five heirs – no waivers filed).
3. Letters of administration issued 10/25/02.
4. Petitioner and attorney each request \$2,440 statutory compensation/fee.  
Calculated. Ok.
5. Need Graduated Filing Fee Schedule per CRC Rule 7.552 even upon waiver of  
account.

RECOMMENDATION

Need to clear notes.

San Bernardino Superior Court  
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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS05015

CASE NAME: MTR OF LAWRENCE EDWARDS & RUBELIA EDWARDS FAMILT T

HEARING:  
OSC re: Sanctions

COUNSEL:

SUSIE M. MIKELL	(PET)...TOM TAKENOUCHI
CLARICE MC GHEE	(PET)...TOM TAKENOUCHI
DAMON ALEXANDER	(OBJ)...E SAMUEL JOHNSON
JOYCE EDWARD HARRIS	(THOMAS C LOFFARELLI )...THOMAS C

GENERAL INFORMATION:

This case is set for hearing re Final Discharge

2<sup>nd</sup> Amended & Final Account granted 11/9/04

Continued from 11/4/05. The Court recognized that objections had been filed by beneficiaries Susie Mikell and Clarice McGhee. Those persons have since filed a Withdrawal of Objections.

Continued from 1/20/06 & 2/24/06 no appearance.

Continued from 5/19/06. No appearance. Clerk mailed notice of continuance.

**\*\*\*Last continued from 8/11/06 for filing of declaration re discharge.**

**\*\*\*On 8/28/06, probate examiner rejected declaration/order re discharge on basis of needed receipts and incomplete submission.**

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERWORK ARE NOTED;

1. Need to file receipts and submit final discharge declaration/order.

RECOMMENDATION:

When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.



San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS05833

CASE NAME: ISRAEL BALLER

HEARING:  
Probate status report filed.

COUNSEL:  
DIANE D. HARKISON (PET)...M DANIEL SAYLOR  
ISRAEL BALLER (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON  
Probate Status Report  
**Continued from 8/18/06.**

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner alleges estate is not in a position to close as petitioner is in the process of selling several parcels of real property. Petitioner requests authority to continue the administration of the estate for an additional 6 months.

RECOMMENDATION:

Court's discretion. If approved, set next accounting review for 4/6/07. Accounting to be filed 30 days in advance.

San Bernardino Superior Court  
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PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS05999

CASE NAME: MTR OF STEPHEN PRICE JR

HEARING:

FINAL DISTRIBUTION AND WAIVER OF Account and Report of STEPHEN L  
PRICE SR , FAE M HARRIS and Petition for allowance of fees  
filed.

COUNSEL:

STEPHEN L PRICE SR (PET)...PRO/PER  
FAE M HARRIS (PET)...PRO/PER  
STEPHEN L PRICE JR (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for final distribution upon waiver of accounting and for fees.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Co-petitioners are the only two heirs and waive accounting.
2. Petitioners waive compensation.
3. No attorney involved – no fees.
4. Need Graduated Filing Fee Schedule per CRC Rule 7.552 even upon waiver of accounting.
5. No proposed distribution is set forth in petition. Proposed order states \$16,531.10 to co-petitioner Stephen Price, Sr. and remainder to be divided between both co-petitioners. Appears co-petitioners would be entitled to equal distribution (as also recognized in petition). Need verified supplement explaining/supporting basis for unequal distribution between co-petitioners.

RECOMMENDATION

Need to clear notes.

San Bernardino Superior Court  
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PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06151

CASE NAME: ESTATE OF ANASTASIA K HAINDL

HEARING:  
Accounting Review

COUNSEL:  
ALFRED HAINDL (PET)...PRO/PER  
ANASTASIA K HAINDL (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Accounting review.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Probate petition granted 12/3/04, full authority, no bond. A 2/17/06 accounting review was set.
2. No accounting filed. Need same.

#### RECOMMENDATION

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06213

CASE NAME: ESTATE OF BEULAH BLANCHE REDMON

HEARING:  
Hearing re: FINAL DISCHARGE

COUNSEL:  
MARSHA DEE COLE (PET)...PRO/PER  
BEULAH BLANCHE REDMON (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Hearing re final discharge.

**Continued from 7/28/06 for receipts. Nothing new filed.**

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. First and final accounting approved 7/22/05 and a 7/28/06 review date was set.
2. Need receipts and final discharge.

#### RECOMMENDATION

When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06447

CASE NAME: EST OF ESTER A VELASQUEZ

HEARING:

FINAL Account and Report of IVORY MARTINEZ and Petition for  
allowance of fees filed.

COUNSEL:

IVORY MARTINEZ (PET)...PRO/PER  
ESTER A VELASQUEZ (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

First and final account and petition for fees.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need corrected notice of hearing and proof of service (notice of hearing filed indicates 9/1/06 hearing date).
2. Letters of administration issued 1/27/06.
3. No I&A is on file. Cannot proceed with accounting without I&A. Petitioner states that I&A was submitted to probate referee 3/1/06 (but not received) and resubmitted 7/15/06 (but incorrect address) and again 8/15/06. Need I&A.
4. Accounting period 9/1/04 to 5/31/06. Accounting period does not make sense. Start date precedes decedent's 12/13/04 death and should be brought more current to finalize accounting. Need verified supplement explaining.
5. Petitioner waives compensation.
6. No attorney involved – no fees.
7. No proposed distribution is set forth in petition. Need verified supplement re same. (An accompanying petition for withdrawal of funds from blocked accounting listing items to be withdrawn and distributed to various heirs is insufficient. Proposed distribution must be set forth and supported in final petition and the other petition for withdrawal is not necessary.)

8. No proposed order filed. Please file same.
9. Need summary of account and supporting schedules per Pr.C. 1061.
10. Need copies of bank statement for Citibank account at end of accounting period.
11. Need Graduated Filing Fee Schedule per CRC Rule 7.552.
12. Was a diligent search for creditors made? Need verified supplement.
13. There are no allegations re whether all taxes have been paid or are outstanding. Need verified supplement.

#### RECOMMENDATION

Need to clear notes.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06706

CASE NAME: MTR OF WILLIAM TICHNELL MARSHALL

**VACATED – FINAL I&A FILED**

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
THOMAS H MARSHALL (PET)...AMY YORK GARRETT  
WILLIAM TICHNELL MARSHALL (DEC)...

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06723

CASE NAME: EST OF HARRY RECHSTEINER

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
WILLIAM W MOORE II (PET)...JOHN M RAGER  
HARRY RECHSTEINER (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Hearing re I&A.

**Continued from 7/14/06 at request of counsel. Nothing new filed.**

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petition for letters testamentary granted 12/9/05 and a 7/14/06 I&A hearing was set.
2. No I&A filed. Need same.

#### RECOMMENDATION

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505.



San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06726

CASE NAME: ESTATE OF PAULETTE GRIMES

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
THOMAS A GRIMES (PET)...GUAY P WILSON  
PAULETTE GRIMES (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Hearing re I&A.

**Continued from 7/14/06 at request of counsel. Nothing new filed.**

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petition for letters testamentary granted 12/9/05 and a 7/14/06 I&A hearing was set.
2. No I&A filed. Need same.

#### RECOMMENDATION

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06783

CASE NAME: THE SUSEHANNAH C BUTTS TRUST

HEARING:

FIRST AND FINAL Account and Report of BONNIE J SCHAFER and  
Petition for allowance of fees filed.

COUNSEL:

BONNIE J SCHAFER (STE)...MCCLELLAN & WILSON

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

First and final account and petition for fees.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner is the successor trustee of a revocable living trust created in 1994.
2. Trustor died in 3/05 and petitioner became successor trustee in 1/06.
3. Accounting period 4/1/05 to 8/2/06 (16 months).
4. Trustee requests \$8,855.99 based upon 1% of trust assets accounted for (\$885,598.72). JTD.
5. Attorney requests confirmation of \$6,716.99 fees based upon .75% of assets accounted for. JTD.
6. Proposed distribution is based upon settlement agreement of beneficiaries following proposed litigation. Ok.
7. Petitioner requests \$10,000 reserve for taxes.

#### RECOMMENDATION

RFA subject to court's determination re compensation and fees. If approved, set hearing re receipts and final discharge for 10/11/07.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06797

CASE NAME: EST OF DONALD ALFRED HAWKINS

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
DEBORAH A HUDDLESTON (PET)...SANDRA B DE MEO  
DONALD ALFRED HAWKINS (DEC)...  
ADVANCE INHERITANCE/JAEMS L LE(TP )...PRO/PER

No file available for review.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06849

CASE NAME: EST OF DAMER JOAN MONTGOMERY

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
STEVEN OLAUSON (PET)...MELISSA E REILLY  
DAMER JUAN MONTGOMERY (DEC)...  
DONALD C EABY (TP )...HARTNELL LISTER & MOORE

No file available for review.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06866

CASE NAME: EST OF LESLIE J HUBBARD

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
MARIA G NICIFOROS (PET)...MARIA G NICIFOROS  
LESLIE J HUBBARD (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Hearing re I&A.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petition for probate granted 3/3/06, full authority, \$300,000 bond.
2. No I&A filed. Need same.
3. Court may wish to notice bonding company re future I&A dates.

RECOMMENDATION

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505.

San Bernardino Superior Court  
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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06869

CASE NAME: EST OF BILLY JOYCE PAREDES

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
ROBERT CHRISTOPHER MEADOR (PET)...STEPHEN I AHLQUIST  
DAVID PAREDES (PET)...STEPHEN I AHLQUIST  
BILLY JOYCE PAREDES (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Hearing re I&A.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petition for probate granted 3/3/06, full authority, no bond.
2. No I&A filed. Need same.

#### RECOMMENDATION

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505.

San Bernardino Superior Court  
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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06870

CASE NAME: ESTATE OF DAVE THOMAS JR.

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
RICHARD M. HARMON (PET)...WILSON, WILSON & PERRIZO  
DAVE THOMAS JR (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Hearing re I&A.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petition for probate granted 3/3/06, limited authority, \$20,000 bond.
2. A partial I&A and Reappraisal for Sale I&A have been filed. Need Final I&A.
3. Court may wish to notice bonding company re future I&A dates.

#### RECOMMENDATION

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505.

San Bernardino Superior Court  
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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06871

CASE NAME: EST OF BARBARA J JONES

**SEE ALSO #22**

HEARING:

FIRST AND FINAL Account and Report of RICHARD L JONES and  
Petition for allowance of fees filed.

COUNSEL:

RICHARD L JONES (PET)...LAW OFFICE OF DAVID SEAN DUFEK  
BARBARA L JONES (DEC)...  
DAVID SEAN DUFEK ESQ (ADM)...LAW OFFICE OF DAVID SEAN DUFEK

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
First and final account and petition for fees.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of administration issued 3/14/06.
2. Petitioner waives compensation.
3. Attorney requests \$3,120 statutory fee. Calculated. Ok.
4. Attorney requests \$1,153 reimbursement for costs advanced. Itemized. Ok.
5. Need verification of petition.
6. Need notice of hearing and proof of service.

RECOMMENDATION

RFA subject to notes 5 and 6. If approved, set hearing re receipts and final discharge for 10/11/07.



San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06871

CASE NAME: EST OF BARBARA J JONES

**SEE ALSO #21**

**VACATED – FINAL I&A FILED. SEE PAGE 21 FOR ACCOUNTING.**

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
RICHARD L JONES (PET)...LAW OFFICE OF DAVID SEAN DUFEK  
BARBARA L JONES (DEC)...  
DAVID SEAN DUFEK ESQ (ADM)...LAW OFFICE OF DAVID SEAN DUFEK

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06874

CASE NAME: MTR OF LUCILLE R BARBOUR

**VACATED – FINAL I&A FILED**

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

JUDITH A SOUTHARD (PET)...THOMAS W DOMINICK

LUCILLE R BARBOUR (DEC)...

WELLS FARGO CARD SERVICES (TP )...PRO/PER

DEPARTMENT OF HEALTH SERVICES (PRO/PER )...PRO/PER

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06876

CASE NAME: ESTATE OF RICHARD JOSEPH PARKER

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

LORANN R. PARKER (PET)...CARL G EHMANN  
RICHARD JOSEPH PARKER (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Hearing re I&A.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petition for probate granted 3/3/06, full authority, no bond.
2. No I&A filed. Need same.

#### RECOMMENDATION

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06878

CASE NAME: MTR OF IRIS DOREEN PLUMMER

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
VIRGINIA ST.GERMAIN (PET)...EDWARD A ST.GERMAIN  
IRIS DOREEN PLUMMER (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Hearing re I&A.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petition for probate granted 3/3/06, full authority, no bond.
2. No I&A filed. Need same.

#### RECOMMENDATION

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS06909

CASE NAME: MTR OF HAZEL IRENE ALLEN

HEARING:

FINAL AND WAIVER Account and Report of JIMMIE DALE ALLEN and  
Petition for allowance of fees filed.

COUNSEL:

JIMMIE DALE ALLEN (PET)...WILLIAM M NASSAR & ASSOCIATES  
HAZEL IRENE ALLEN (DEC)...  
DEPARTMENT OF HEALTH SERVICES (TP )...PRO/PER  
HEIR BUYOUT COMPANY (PRO/PER )...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for final distribution on waiver of account and for fees.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters testamentary issued 3/24/06.
2. All beneficiaries waive accounting.
3. Petitioner (as beneficiary) assigned \$8,340 of inheritance to Heir Buyout Company in exchange for \$4,998.10 (60% of assignment). Court may refuse to order distribution if it finds that the fees taken were grossly unreasonable. Pr.C. 11604.5(h)(1). JTD.
4. Petitioner and attorney each request \$7,300 statutory compensation/fees. Calculated. Ok.

RECOMMENDATION

RFA subject to court's approval of assignment. If approved, set hearing re receipts and final discharge for 10/11/07.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07199

CASE NAME: ESTATE OF ETHEL LOUISE PHIPPS

HEARING:

Petition for Probate, Letters of Tstmnty with full authority  
under IAEA.

COUNSEL:

DONNA HARWARD (PET)...D. HERSHEL W ILSON  
ETHEL LOUISE PHIPPS (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for letters testamentary, full authority.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need proof of publication.
2. Will waives bond. Petitioner is a CA resident.

RECOMMENDATION

RFA subject to note 1, no bond. If approved, set hearing re I&A for 5/24/07. Set accounting review for 12/20/07. Accounting to be filed 30 days prior. Note local rule re bank statements.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07214

CASE NAME: ESTATE OF FRANK J PLASH

HEARING:

Petition for Probate, Letters of Tstmnty with full authority  
under IAEA.

COUNSEL:

PHILIP KASSEL  
FRANK J PLASH

(PET)...MCPETERS MCALEARNEY SHIMOFF &  
(DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for letters testamentary, full authority.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need proof of publication.
2. Will waives bond. Petitioner is a CA resident. Estate is \$2.45 million personal property.
3. Will conditionally incorporates by reference the terms of decedent's 10/18/05 trust. Moreover, the trust beneficiaries are listed as noticed entities. Need copy of trust as part of documents to be probated.

#### RECOMMENDATION

Need to clear notes.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07216

CASE NAME: ESTATE OF BETTY LOU REPPOND

HEARING:

Petition for Probate, Letters of Tstmnty with full authority  
under IAEA.

COUNSEL:

MELVIN GLEN REPPOND JR (PET)...BRUNICK MCELHANEY & BECKETT  
BETTY LOU REPPOND (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for letters testamentary, full authority.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need proof of publication.
2. Need notice of petition to administer and proof of service.
3. Will waives bond. Also, all beneficiaries waive bond. However, petitioner is an AZ resident. Bond will normally be required of nonresident personal representatives even when will waives bond. Estate is \$350,000 (including \$348,000 personal property and \$2,000 annual income). Does court wish to require bond?

RECOMMENDATION

RFA subject to notes 1 and 2 and court's determination re bond. If approved, set hearing re I&A for 5/24/07. Set accounting review for 12/20/07. Accounting to be filed 30 days prior. Note local rule re bank statements.



San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07217

CASE NAME: MTR OF THERERSA V COLDREN

HEARING:

Petition for Probate, Letters of Tstmnty with full authority  
under IAEA.

COUNSEL:

DAVID L COLDREN (PET)...CARROLL M LAWSON  
THERESA B COLDREN (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for letters testamentary, full authority.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need proof of publication.
2. Need notice of petition to administer and proof of service.
3. Will waives bond. Petitioner is a CA resident

RECOMMENDATION

RFA subject to notes 1 and 2, no bond. If approved, set hearing re I&A for 5/24/07. Set accounting review for 12/20/07. Accounting to be filed 30 days prior. Note local rule re bank statements.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07218

CASE NAME: MTR OF ANTHONY ANGELETAKIS

HEARING:  
Petition for APPLICATION FOR ORDR ESTABLISHING SPECIAL NEEDS  
TRUST

COUNSEL:  
CHRISTOS ANGELETAKIS (PET)...PRO/PER

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Petition to establish special needs trust.

#### THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need notice of hearing and proof of service.
2. Petitioner (Christos Angeletakis) is the brother of the proposed trust beneficiary (Anthony Angeletakis).
3. Petitioner requests the creation and funding of a special needs trust on behalf of proposed beneficiary on the basis that the beneficiary is an incompetent under the care of Patton State Hospital, is ready to receive a \$19,596.81 inheritance from a probate administration in Orange County, but that to receive the inheritance would put beneficiary over the \$2,000 threshold for maintaining SSI and Medi-Cal benefits. Petitioner would be trustee of the trust. Text of proposed trust is attached to petition.
4. Petitioner requests \$30,000 bond. Appears ok.
5. Need verified supplement supporting need for trust (proposed beneficiary's current assets, income, expenses, care expenses, etc.) including a discussion of the findings required by Pr.C. 3604(b).

RECOMMENDATION  
Need to clear notes.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07219

CASE NAME: ESTATE OF SARAH M WEATHERMAN

HEARING:  
PETITION FOR LETTERS OF ADMINISTRATION W/WA W/FULL AUTHORITY  
UNDER IAEA.

COUNSEL:  
VIRGINIA WEATHERMAN TALLEY (PET)...WALTER T. MOORE  
SARAH M WEATHERMAN (DEC)...

GENERAL INFORMATION

Ex parte petitions for letters of special administration and to enjoin trustee sale of real property granted 8/31/06.

THIS CASE IS SET FOR HEARING ON

Petition for letters of administration with will annexed, full authority.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need proof of publication.
2. Petitioner requests \$20,000 bond. Estate is \$112,000 real property. No explanation provided. However, petitioner is sole residual beneficiary. JTD.
3. Need proof of holographic will.
4. No executor named – petitioner is sole residual beneficiary.

RECOMMENDATION

RFA subject to notes 1 and 3 and court's determination re bond. If approved, set hearing re I&A for 5/24/07. Set accounting review for 12/20/07. Accounting to be filed 30 days prior. Note local rule re bank statements.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07220

CASE NAME: ESTATE OF TIMOTHY JAMES REID

HEARING:  
Petition to determine succession to Real Property

	COUNSEL:
CLAIRE REID	(PET)...ANNDERSON KREHBIEL MCCREARY &
JONAS J REID	(PET)...ANNDERSON KREHBIEL MCCREARY &
SHERMAN REID	(PET)...ANNDERSON KREHBIEL MCCREARY &
TIMOTHY JAMES REID	(DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Petition to determine succession to real property.

#### THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Co-petitioners are decedent's surviving spouse and both sons. Petitioners seek succession to real property and business interest.
2. Decedent died intestate. Proposed succession is one-third to each petitioner.
3. I&A value for decedent's real property is \$8,000 total.
4. Need copy of deed evidencing decedent's ownership interest in the property.

#### RECOMMENDATION

RFA subject to note 4. No future dates need be set.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
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HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07221

CASE NAME: MTR OF ESTHER VALITA BOYER

HEARING:  
PETITION FOR LETTERS OF ADMINISTRATION W/WA W/FULL AUTHORITY  
UNDER IAEA.

COUNSEL:  
SHERRY DODD (PET)...HARRY E BROWN & ASSOCIATES  
ESTHER VALITA BOYER (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Petition for letters of administration with will annexed, full authority.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need proof of publication.
2. Sole beneficiary (Gregory Boyer – not the same person and petitioner) waives bond. Petitioner is a CA resident.
3. No executor named – petitioner is nominated by sole beneficiary.

#### RECOMMENDATION

RFA subject to note 1, no bond. If approved, set hearing re I&A for 5/24/07. Set accounting review for 12/20/07. Accounting to be filed 30 days prior. Note local rule re bank statements.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07222

CASE NAME: PAUL WILLIAM HUNING REVOCABLE TRUST

**PAGES 35 AND 35A ARE SAME CASE – SEE PAGE 35 FOR ALL NOTES**

HEARING:

Petition for FOR APPOINTMENT OF SUCCESSOR TRUSTEE -

COUNSEL:

CAROLYN COLE (PET)...AARON CHARLE GREGG

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

- 1) Petition for appointment of successor trustee.
- 2) Petition to determine title to real and personal property  
(Pr.C. 850 - Heggstad petition).

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

**Petition for appointment of successor trustee:**

1. Trustor created a revocable trust 5/31/05, died 3/9/06.
2. Petitioner alleges that both named successor trustees (William Huning and Jennifer Ramirez – son and daughter of decedent) have declined to act as trustee. No additional alternate executors are named.
3. The three beneficiaries of the trust are the two declining successor trustees and Amber Poindexter (step-granddaughter). The two declining successors have signed declinations to act and nominations of petitioner.
4. No opposition filed as of date of review. The third beneficiary (Amber Poindexter) was served with the petition.

**Petition to determine title to real and personal property (Heggstad Petition):**

5. Petitioner (Carolyn Cole) is the same petitioner as in petition #1. Therefore. The court reaches this petition only after granting petition #1 (petitioner would need to be appointed successor trustee before having standing to bring this petition).
6. Petitioner proceeds per Estate of Heggstad (1993) 16 Cal.App.4<sup>th</sup> 943 to request that real property in Lake Arrowhead and various bank and investment accounts (all owned by decedent trustor) be determined to be trust property. Petitioner alleges that the property was all held by petitioner individually but that there is evidence of intent for the property to be trust property based upon Exhibit A to the trust which lists these items as trust property.
7. Petitioner executed a will on 4/30/06 that is not a pour-over will and instead bequeathed the property. However, the trust was formed a month later (5/31/05) and therefore the will does not establish conflicting intent re whether the property was trust property.
8. Need copies of deed to real property and bank/investment accounts to establish decedent trustor's ownership interest in properties.

**RECOMMENDATION**

Court's discretion re petition #1.

Need copies of deed/account statements re petition #2, then court's discretion.

Superior Court of Calif, County of San Bernardino

Page: 35A

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
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HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07222

**PAGES 35 AND 35A ARE SAME CASE – SEE PAGE 35 FOR ALL NOTES**

CASE NAME: PAUL WILLIAM HUNING REVOCABLE TRUST

HEARING:

Petition for FOR ORDER DETIRMING TITLE TO REAL AND PERSONAL  
PROPERTY

COUNSEL:  
CAROLYN COLE (PET)...AARON CHARLE GREGG



San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
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HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07223

CASE NAME: MTR OF HARVEY GEORGE DELO

HEARING:

Petition for Probate, Letters of Tstmnty with full authority  
under IAEA.

COUNSEL:

MICHAEL DALE DELO (PET)...ROGER VON KAESBORG  
HARVEY GEORGE DELO (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for letters testamentary, full authority.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need proof of publication.
2. Will waives bond. Petitioner is a CA resident.

RECOMMENDATION

RFA subject to note 1, no bond. If approved, set hearing re I&A for 5/24/07. Set accounting review for 12/20/07. Accounting to be filed 30 days prior. Note local rule re bank statements.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07224

CASE NAME: ESTATE OF MARJORIE M. FITCH

HEARING:

Petition for Probate, Letters of Tstmnty with full authority  
under IAEA.

COUNSEL:

WILLIAM FITCH (PET)...ROGER VON KAESBORG  
MARJORIE M. FITCH (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for letters testamentary, full authority.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need proof of publication.
2. Will waives bond. Petitioner is a CA resident.
3. Deceased spouse is not listed in section 9 of petition. (All persons specified in section 6 of petition must be listed in section 9 of petition.) Need verified supplement establishing name and deceased status of spouse.

RECOMMENDATION

RFA subject to notes 1 and 3, no bond. If approved, set hearing re I&A for 5/24/07. Set accounting review for 12/20/07. Accounting to be filed 30 days prior. Note local rule re bank statements.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07225

CASE NAME: MTR OF JIMMIE L MAJOR

HEARING:  
Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:  
SHIRLENE MAJOR (PET)...MICHAEL O COLLINS  
JIMMIE L MAJOR (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Petition for letters of administration, full authority.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need proof of publication.
2. Need notice of petition to administer and proof of service.
3. Both heirs waive bond. Petitioner is a CA resident.

#### RECOMMENDATION

RFA subject to notes 1 and 2, no bond. If approved, set hearing re I&A for 5/24/07. Set accounting review for 12/20/07. Accounting to be filed 30 days prior. Note local rule re bank statements.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 9:30 DEPT: S5P  
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CASE #: SPRSS07228

CASE NAME: ESTATE OF DAMACIA V. VILLALPANDO SR

HEARING:

Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

DAMACIO VALLALPANDO JR (PET)...PRO/PER  
DAMACIO V. VILLALPANDO SR (DEC)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for letters of administration, full authority.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need proof of publication.
2. All three heirs waive bond and nominate petitioner. Petitioner is a CA resident.

#### RECOMMENDATION

RFA subject to note 1, no bond. If approved, set hearing re I&A for 5/24/07. Set accounting review for 12/20/07. Accounting to be filed 30 days prior. Note local rule re bank statements.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 10:45 DEPT: S5P  
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CASE #: SC SS01241

CASE NAME: IN THE MATTER OF NATALIE ANN MORRIS

**SEE ALSO #46**

HEARING:  
Accounting Review

COUNSEL:  
NATALIE ANN MORRIS (CTP)...C L FARRELL  
MURIEL TUCKER (CP )...RUDY AGUIRRE  
EMMA J. SAMUEL (MOT)...PRO/PER  
INLAND COUNTIES REGIONAL CENTE(FRANCES G HERBERT  
)...FRANCES G

GENERAL INFORMATION:

On 5/12/06, the court granted authority to petitioner (Muriel Tucker) to establish an irrevocable trust through Inland Regional Center and the court set this review date for conservator to file a final accounting.

**Continued from 8/25/06 to complete sale of real property. Note that petition for order confirming sale of real property is on calendar for this same date.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner, as conservator, filed a first & final accounting for the period ending 1/31/06 which was approved by the court on 3/10/06. Does court wish to require petitioner to file a subsequent accounting to cover the period 1/31/06-5/12/06? An accounting review for the trust has been set for 5/18/07.

RECOMMENDATION:  
Court's discretion.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 10:45 DEPT: S5P  
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CASE #: SC SS02039

CASE NAME: MTR RE JOAN SMITH

HEARING:

THIRD Account and Report of DIANE D HARKISON and Petition for allowance of fees filed.

COUNSEL:

DIANE D HARKISON (CPE)...M DANIEL SAYLOR  
JOAN SMITH (CEP)...ANNETTE G DE BELLEFEUILLE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Third account and petition for fees.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need notice of hearing and proof of service.
2. Conservatorship by private professional established in 2002.
3. Accounting period 9/28/04 to 6/26/06 (21 months).
4. Assets on hand \$109,988.30.
5. Petitioner requests \$15,811.15, of which \$5,250 has been paid per prior court order, leaving a \$10,561.15 balance. Itemized, based upon 238.53 hrs at \$35/55/75 per hr (professional and non-professional services). JTD.
6. Petitioner requests continued authority to take \$250/mo advance for services rendered. JTD.
7. Attorney requests \$3,020.50. Itemized, based upon 20.8 hrs, attorney at \$250/hr and paralegals at \$85/60 per hr. Does court wish to allow billing above usual \$75/hr allowed for paralegals? Reduction would be \$10/hr x 6.3 hrs billed = \$63 reduction (\$2,957.50 total allowed). JTD.
8. Petitioner requests bond increase from \$50,000 to \$130,000 (\$80,000 increase) based upon \$109,988.30 assets on hand and \$25,000 anticipated income, minus anticipated fees. Appears ok.
9. Need bank statements for end of accounting period.

RECOMMENDATION

RFA subject to note 9 and court's determination re compensation and fees. If approved, set next accounting review for 10/23/08.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 10:45 DEPT: S5P  
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CASE #: SC SS02284

CASE NAME: MATTER OF HELEN B JONES

HEARING:

Motion re: TO APPOINT NEW COUNSEL FOR CONSERVATEE HELE B JONE  
filed by Petitioner MICHAEL A TOMAZIN

COUNSEL:

MELODIE Z SCOTT	(CPE)...	HARTNELL HORSPPOOL & FOX
HELEN B JONES	(CEP)...	DONNASUE SMITH-ORTIZ
MICHAEL A TOMAZIN	(SC )...	J STANLEY TEIXERIA
INLAND LEGAL SERVICES	(TP )...	ROBERT S RODDICK

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Motion to appoint new counsel for conservatee.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Successor conservator (and conservatee's ex-step grandson) Michael Tomazin petitions for appointment of new counsel for conservatee. Conservatee is currently represented by Donnasue Smith-Ortiz. Petitioner seeks the appointment of attorney Robert Roddick of Inland Counties Legal Services on the basis that conservatee repeatedly has expressed a desire for representation by attorney Roddick.
2. Need report of current appointed counsel, Donnasue Smith-Ortiz.
3. Need notice of hearing with proof of service (mere proof of service on back of motion brief is insufficient).
4. No opposition filed as of date of review.

#### RECOMMENDATION

Need to clear notes 2 and 3, then court's discretion.



San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 10:45 DEPT: S5P  
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CASE #: SC SS02606

CASE NAME: MTR OF KHRISTY REINING

HEARING:

Hearing re: INVENTORY & APPRAISAL/ACCT REVIEW

COUNSEL:

APRIL JOHNSON (CPE)...PRO/PER  
KHRISTY REINING (CEP)...DONNA STURGILL DIAZ

GENERAL INFORMATION:

This matter is set for hearing on inventory and appraisal.

Continued from November 18, 2005, at the request of the parties because a new petition for conservatorship is to be filed. Nothing new filed.

Continued from 1/27/06 at request of counsel. Nothing new filed.

Continued from 4/14/06 at request of counsel. Nothing new filed.

**\*\*\*Last continued from 7/14/06. Court appointed Bud Garvin as Probate Referee.**

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Inventory is not filed. However, letters of conservatorship have never issued.  
Orders re limited conservatorship were granted on 7/30/04.
2. At 11/18/05 hearing, court ordered April Johnson to remain as acting conservator until the new petition is filed. Court noted issue re real property was pending.

RECOMMENDATION:

When an inventory and appraisal is not filed as ordered, court may set hearing in accord with Pr. C. § 2614.5.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

-----  
DATE: 10/06/06 TIME: 10:46 DEPT: S5P  
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CASE #: SC SS02960

CASE NAME: MTR OF TIMOTHY TODD BRITT

HEARING:

Petition for FOR SUBSTITUTED JUDGMENT TO CREATE AND FUND SPECIAL  
NEEDS TRUST

COUNSEL:

BENJAMIN BRITT (CPE)...WILKINSON & WILKINSON  
TIMOTHY TODD BRITT (CEP)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Petition for substituted judgment to create special needs trust.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need notice of hearing and proof of service.
2. Conservatorship of person and estate established 1/06.
3. Petitioner (conservator/brother Benjamin Britt) now seeks to establish a special needs trust for conservatee on the basis that conservatee is to receive an \$83,177.73 testamentary distribution from the trust of conservatee's deceased mother and seeks to avoid the loss of SSDI and Medi-Cal benefits. Conservatee's other assets amount to \$696.95 cash and \$1,000 miscellaneous personal property.
4. Conservatee has signed a consent to create the special needs trust and place all assets in the trust.
5. A copy of the special needs trust is attached to the petition.
6. Attorney seeks \$7,500 fees for this petition and creation of the special needs trust instrument. Itemized, based upon 30.9 hrs. Amount reduced per agreement with conservator from the \$8,025 itemized. JTD.

7. Need verified supplement re income, expenses, and special needs of conservatee over his life expectancy to establish that creation of special needs trust (and the amount of that trust) would be appropriate.

#### RECOMMENDATION

Need to clear notes.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 10:45 DEPT: S5P  
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CASE #: SPRSS06606

CASE NAME: MTR OF DOUGLAS RAYMOND BOYLE

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
PHIL AMADOR (PET)...WELCH DACRE & ASSOCIATES, P.C.  
DOUGLAS RAYMOND BOYLE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Inventory & Appraisal  
**Continued from 4/28/06 and 7/21/06 at request of counsel.**

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Final Inventory was filed on 3/8/06 and bond was marked "sufficient."  
However, bond is fixed at \$35,000 and the inventory value is \$60,033.19  
(cash). The personal representative and counsel have a duty to apply for an  
increased bond CRC 7.204. The court may wish to set a review date on the  
bond sufficiency.

RECOMMENDATION:  
Set OSC re bond sufficiency.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 10:45 DEPT: S5P  
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CASE #: SPRSS06775

CASE NAME: EST OF ROBERT DALE ALEXIS

HEARING:  
Hearing re: INVENTORY AND APPRAISAL

COUNSEL:  
L ALEXIS (PET)...GUAY P WILSON  
ROBERT DALE ALEXIS (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON filing Inventory & Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Letters of Administration issued 1/6/06 (full authority, no bond)
2. Inventory is not filed (overdue by five months)

RECOMMENDATION:

When an inventory and appraisal is not filed as ordered, court may set hearing in accord with Pr. C. §§ 8804 and/or 8505.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 10:46 DEPT: S5P  
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CASE #: SC SS01241

CASE NAME: IN THE MATTER OF NATALIE ANN MORRIS

**SEE ALSO #40**

HEARING:  
Report Sale and Petition for Order Confirming Sale of Real Property

COUNSEL:  
NATALIE ANN MORRIS (CTP)...C L FARRELL  
MURIEL TUCKER (CP )...RUDY AGUIRRE  
EMMA J. SAMUEL (MOT)...PRO/PER  
INLAND COUNTIES REGIONAL CENTE(FRANCES G HERBERT

Address: 1924 Sosa Ln, Colton, CA  
(undivided 50% interest – proposed buyer owns the other 50%)

Appraised Value: \$190,000 (reappraisal for sale 2/20/06)

Sale Price: \$171,000 (90% of appraisal)

First Overbid: \$180,050

Deposit: \$17,100

Commission: **Not specified. Need verified supplement.**

Additional Bond: None required.

Reason for Sale: To pay expenses, advantage of estate.

Market Exposure: Published. Buyer owns the other 50%.

Notice: **Need notice of hearing and proof of service.** Published.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 10:46 DEPT: S5P  
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CASE #: SC SS01899

CASE NAME: MATTER OF ELSIE S KOSS

HEARING:

SECOND Account and Report of SLOANE KOSS ALLEN and Petition for allowance of fees filed.

COUNSEL:

SLOANE KOSS ALLEN (CPE)...BETTY S.N. AUTON  
ELSIE S KOSS (CEP)...  
BOND SERVICES OF CALIF. INS. (TP )...PRO/PER

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

Second trust accounting and petition for fees.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need notice of hearing and proof of service.
2. Petitioner is trustee of conservatee's revocable trust.
3. Accounting period 6/26/04 to 7/26/06 (25 months).
4. Assets on hand \$790,296.52.
5. Petitioner has not accepted compensation as trustee.
6. Attorney has received \$1,647.55 fees. No fee detail provided. Faced with trust accounting, court is not approving the payment of fees, yet petitioner asks for order confirming and approving all actions of petitioner. Would need billing detail to confirm/approve fees.
7. Need investment statements for the two Merrill Lynch investment accounts.

#### RECOMMENDATION

Need to clear notes.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 10:46 DEPT: S5P  
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CASE #: SC SS02128

CASE NAME: MTR RE CAROL PETRICK

HEARING:

Petition for FOR ATTY'S FEES AND FOR ORDR TERMINATING APPT AS  
COUNSEL AND REQUIRING NO FURTHER SERVICE

COUNSEL:

LAWRENCE A DEAN II (CPE)...HARTNELL HORSPOOL & FOX  
CAROL PETRICK (CEP)...DUANE P BOOTH

No file available for review.



San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI  
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DATE: 10/06/06 TIME: 10:46 DEPT: S5P  
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CASE #: SC SS02423

CASE NAME: MTR OF IRENE DURON

HEARING:  
Petition for TERMINATE CONSERVATORSHIP/ALLOW VISITATION -

	COUNSEL:
MELODIE Z. SCOTT	(CE )...J. DAVID HORSPPOOL
IRENE DURON	(CEP)...LENITA A SKORETZ
VINCENT NAVARRO	(TP )...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Petition to terminate conservatorship of person and/or to allow visitation.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Melodie Scott was appointed conservator of estate in 11/03 and conservator of person in 12/04.
2. Petitioner is husband of conservatee.
3. Petitioner alleges that conservatee was taken away by police and was committed. Also alleges he has not seen wife/conservatee in three years. Petitioner asserts that he does not know why conservatorship is warranted, especially by a stranger. Petitioner argues that conservatorship should be terminated, or at least that visitation should be granted.
4. Most recent periodic CI report was in 12/04, notes that conservatee resided in board and care in Loma Linda where she was admitted in 11/03 (matches date of appointment of conservator of person). Does not appear to be locked facility or anything more than normal board and care. Question why petitioner/husband believes conservatee/wife was committed or why he cannot visit wife.

5. Attorney Lenita Skoretz was appointed counsel for conservatee during establishment of conservatorship. Suggest court inquire of counsel re conservatee's current living conditions.
6. Petitioner served conservator and counsel for conservatee. No opposition filed as of date of review.

#### RECOMMENDATION

Court's discretion.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 10:46 DEPT: S5P  
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CASE #: SC SS02835

CASE NAME: MTR OF MARY FARRINGTON

HEARING:

FIRST REPORT OF CONSERVATOR WITH WAIVER OF Account and Report of  
JAHN FARRINGTON and Petition for allowance of fees filed.

COUNSEL:

JAHN FARRINGTON (CPE)...HORSPOOL & PARKER  
MARY FARRINGTON (CEP)...

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON

First report upon waiver of account (small estate).

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Conservatorship of person and estate established in 2005.
2. Reporting period 3/15/05 to 3/14/06 (12 months).
3. Petitioner requests waiver of account based upon small estate (Pr.C. 2628).  
Petitioner's verified petition establishes that the conditions for small estate are met.
4. Need periodic CI report.
5. Need notice of hearing and proof of service.

#### RECOMMENDATION

Need notice and CI report, then court's discretion. If approved, set next accounting review for 10/23/08.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS01411

CASE NAME: MATTER OF ALBERT DURAN

HEARING:  
Accounting Review

COUNSEL:  
INLAND COUNTIES REGIONAL CENTE(PET)...BRUNICK MCELHANEY &  
BECKETT  
ALBERT DURAN (CTE)...

No file available for review.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

-----  
DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS01729

CASE NAME: MTR OF ALYSALMAN KHWAJA

HEARING:  
Accounting Review

COUNSEL:  
SHARIFA KHWAJA (CP)...PRO/PER  
ALYSALMAN KHWAJA (CTP)...ROBERT C CHANDLER

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON  
Accounting review.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Conservatorship of estate established in 2001.
2. Ex parte petition to dispense without accounting for period up to 8/3/04 granted in 8/04 (small estate per Pr.C. 2628).
3. Need accounting or petition to dispense with same for period 8/4/04 to 8/4/06.
4. Clerk mailed notice of hearing.

#### RECOMMENDATION

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

Superior Court of Calif, County of San Bernardino

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San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS02084

CASE NAME: MTR OF RONALD MISCOVIC

HEARING:  
Accounting Review

COUNSEL:  
INLAND COUNTIES REGIONALCNTR I(CE )...BRUNICK MCELHANEY & BECKETT  
RONALD MISCOVIC (CTE)...

GENERAL INFORMATION:  
3<sup>rd</sup> Accounting is due for the period 6/1/04 – 5/31/06

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed.

RECOMMENDATION:  
When an accounting is not filed as required, the court shall take action as specified in  
Pr.C. § 2620.2.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS02486

CASE NAME: MTR RE HELEN M RAIRDEN

HEARING:  
Accounting Review

COUNSEL:  
KENNETH SCHMIDT (CE )...ANNETTE G DE BELLEFEUILLE  
HELEN M RAIRDEN (CTE)...WALTER MOORE  
DIANE D HARKISON (CPE)...

GENERAL INFORMATION:

On 8/2/05, the Court compelled successor trustee (Kristen Kay Schmidt) to account for the Rairden Family Trust by 10/25/06.

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not yet filed, but court granted the successor trustee until 10/25/06 to account. Thus, this review hearing may be premature. Court may wish to continue to a date after 10/25/06.

RECOMMENDATION:

Continue matter to 11/2/06.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS02809

CASE NAME: MTR RE GLORIA EVELYN GRGEC

HEARING:  
Accounting Review

COUNSEL:  
TRACI ALLEN (CPE)...E. JOAN NELMS  
JAMES ALLEN (CPE)...E. JOAN NELMS  
GLORIA EVELYN GRGEC (CEP)...ANNETTE G DE BELLEFEUILLE  
FRANK J PRAINITO (TP )...PRO/PER

GENERAL INFORMATION:  
1<sup>st</sup> Accounting is due for the period 7/22/05 – 7/21/06

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;  
1. Accounting is not filed.

RECOMMENDATION:  
When an accounting is not filed as required, the court shall take action as specified in  
Pr.C. § 2620.2.



San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

-----  
DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS02823

CASE NAME: MTTR OF MICHAEL JOSEPH DAVIS

HEARING:  
Accounting Review

COUNSEL:  
MARY LOUISE DAVIS (CPE)...PRO/PER  
MICHAEL JOSEPH DAVIS (CEP)...DONNA STURGILL DIAZ

GENERAL INFORMATION:  
1<sup>st</sup> Accounting is due for the period 4/15/05 – 4/14/06

THIS CASE IS SET FOR HEARING ON Accounting Review and on filing Inventory & Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;  
1. Inventory is not filed.  
2. Accounting is not filed.

RECOMMENDATION:  
When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

Superior Court of Calif, County of San Bernardino

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San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS02823

CASE NAME: MTTR OF MICHAEL JOSEPH DAVIS

HEARING:

Hearing re: INVENTORY AND APPRAISAL

COUNSEL:

MARY LOUISE DAVIS (CPE)...PRO/PER

MICHAEL JOSEPH DAVIS (CEP)...DONNA STURGILL DIAZ

See prior notes (matter 56)

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS02928

CASE NAME: MTR OF ALICE L ROLEN

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
ALICE L ROLEN (CEP)...ROBERT S WORLEY

GENERAL INFORMATION:

1<sup>st</sup> Accounting is due for the period 8/29/05 – 8/28/06

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS02976

CASE NAME: MATTER OF DONALD WAGNER

HEARING:  
Hearing re: INVENTORY AND APPRAISAL

COUNSEL:  
CHRISTINA ERICKSON-TAUBE (CPE)...SHERRI L KASTILAHN  
DONALD WAGNER (CEP)...EDWARD B FISCHER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON filing Inventory & Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Final Inventory is filed. However, need original bank statements for accounts listed in item 1 and Bank of America accounting ending in \*\*\*545.

RECOMMENDATION:  
Need original bank statements.

2.

Superior Court of Calif, County of San Bernardino  
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San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

-----  
DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS02977

**VACATE – INVENTORY FILED**

CASE NAME: MATTER OF EVA WAGNER

HEARING:  
Hearing re: INVENTORY AND APPRAISAL

COUNSEL:  
CHRISTINA ERICKSON-TAUBE (CPE)...SHERRI L KASTILAHN  
EVA WAGNER (CEP)...DUANE P BOOTH

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SC SS5741

CASE NAME: IN THE MTTR OF SANDRA MARTINEZ

HEARING:  
Accounting Review

	COUNSEL:
SANDRA MARTINEZ	(CEP)...
SYLVIA GARCIA	(SC )...PRO/PER

No file available for review.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SPRSS05082

CASE NAME: MTR OF NELSON SPECIAL NEEDS TRUST

HEARING:  
Accounting Review

COUNSEL:  
LIZ NELSON (PET)...LENITA A SKORETZ  
EVERETT NELSON (OBJ)...AARON CHARLE GREGG

GENERAL INFORMATION:

1<sup>st</sup> accounting is due from the successor trustee (Liz Nelson)  
for the period 12/2/02 – the current date

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed.
2. Per Order Settling prior account granted 10/1/04, court ordered successor trustee to post bond of \$400,000. It does not appear bond has been posted and is overdue. Does court wish to suspend trustee until proper bond is posted?

RECOMMENDATION:  
Court's discretion.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SPRSS05961

CASE NAME: MTTR OF EDWARDS CHILDREN SPECIAL NEEDS TRUST

HEARING:  
Accounting Review

COUNSEL:  
DEVIN EDWARDS SR (TEE)...JACK H ANTHONY

GENERAL INFORMATION:  
1<sup>st</sup> Accounting due for the period 10/1/04 – 9/30/06

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed.

RECOMMENDATION:  
Find out status.



San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SPRSS06114

CASE NAME: MTR OF ROSS FRANK DAUGHTRY

HEARING:  
Hearing re Final Discharge

COUNSEL:  
LINDA J HOHENSEE (PET)...RONALD G. SKIPPER  
ROSS FRANK DAUGHTRY (DEC)...

GENERAL INFORMATION:  
Order for Final Distribution granted 9/30/05

THIS CASE IS SET FOR HEARING ON Final Discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Need to file receipts and submit final discharge.

RECOMMENDATION:  
Find out status.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SPRSS06446

CASE NAME: ESTATE OF ANNA L DANIELS

HEARING:  
Accounting Review

	COUNSEL:
RUBY COOPER	(PET)...HARTNELL, LISTER & MOORE
ANNA L DANIELS	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting and/or status report is not filed.

RECOMMENDATION:  
Find out status.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

-----  
DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SPRSS06515

CASE NAME: MTR OF OTIS FAMILY TRUST DATED 10/28/92

HEARING:  
Accounting Review

COUNSEL:  
SHERY OTIS (PET)...ALTHOUSE & MCDONOUGH

GENERAL INFORMATION:

1<sup>st</sup> Accounting is due for the Otis Family Trust for the period 7/22/05 – 7/21/06

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed.

RECOMMENDATION:

Find out status.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SPRSS06517

CASE NAME: MTR OF BETTY MAE BERTGES

HEARING:  
Accounting Review

COUNSEL:  
RUTH ANN BERTGES (PET)...PRO/PER  
BETTY MAE BERTGES (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting and/or status report is not filed.
2. Inventory is not filed. At hearing on 6/23/06, petitioner informed court that inventory would be filed that date. Nothing is filed.

RECOMMENDATION:

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq.

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE FRANK GAFKOWSKI

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DATE: 10/06/06 TIME: 11:00 DEPT: S5P  
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CASE #: SPRSS06877

CASE NAME: ESTATE OF FELIPE G. CONTRERAS

HEARING:  
Hearing re: INVENTORY AND APPRAISAL

COUNSEL:  
RAY CONTRERAS (PET)...JOHN M RAGER  
FELIPE G. CONTRERAS (DEC)...  
DEPARTMENT OF HEALTH SERVICES (TP )...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON filing Inventory & Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Final Inventory is filed. However, on statement of bond, attorney alleges bond of \$50,000 is sufficient yet the inventory is valued at \$210,000 and petitioner has full IAEA authority. Petitioner/counsel have a duty to immediately apply for an increase of bond when bond is insufficient (CRC 7.204[a]). Court may wish to set a review date on bond sufficiency.

RECOMMENDATION:

Court may wish to set review date re bond sufficiency (suggest 11/2/06).

San Bernardino Superior Court  
CIVCAL4 San Bernardino District  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE MICHAEL A SMITH

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DATE: 10/06/06 TIME: 8:30 DEPT: S19  
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CASE #: SPRSS06810

CASE NAME: EST OF ANGELA M RAMOS

HEARING:

WAIVER AND FINAL Account and Report of GLORIA M SCHULTZ and  
Petition for allowance of fees filed.

COUNSEL:

GLORIA M SCHULTZ (PET)...JOHN M RAGER  
ANGELA M RAMOS (DEC)...  
DEPARTMENT OF HEALTH SERVICES (TP )...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Accounting and Petition for Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner is sole beneficiary and waives an accounting.
2. Petitioner waives statutory compensation.
3. Attorney requests statutory fees of \$9,600. Ok.
4. Attorney requests reimbursement of costs advanced of \$888.50. Itemized.  
Ok.
5. Need to file proof of payment of graduated filing fee due (\$71.50)
6. Petitioner alleges there is an outstanding creditor's claim filed by the Dept. of  
Health Services in the total amount of \$46,989.79. Question whether said  
claim has been paid? File verified supplement.

RECOMMENDATION:

RFA subject to notes 4 & 5. Once approved, set hearing for filing of receipts and final  
discharge for 10/11/07